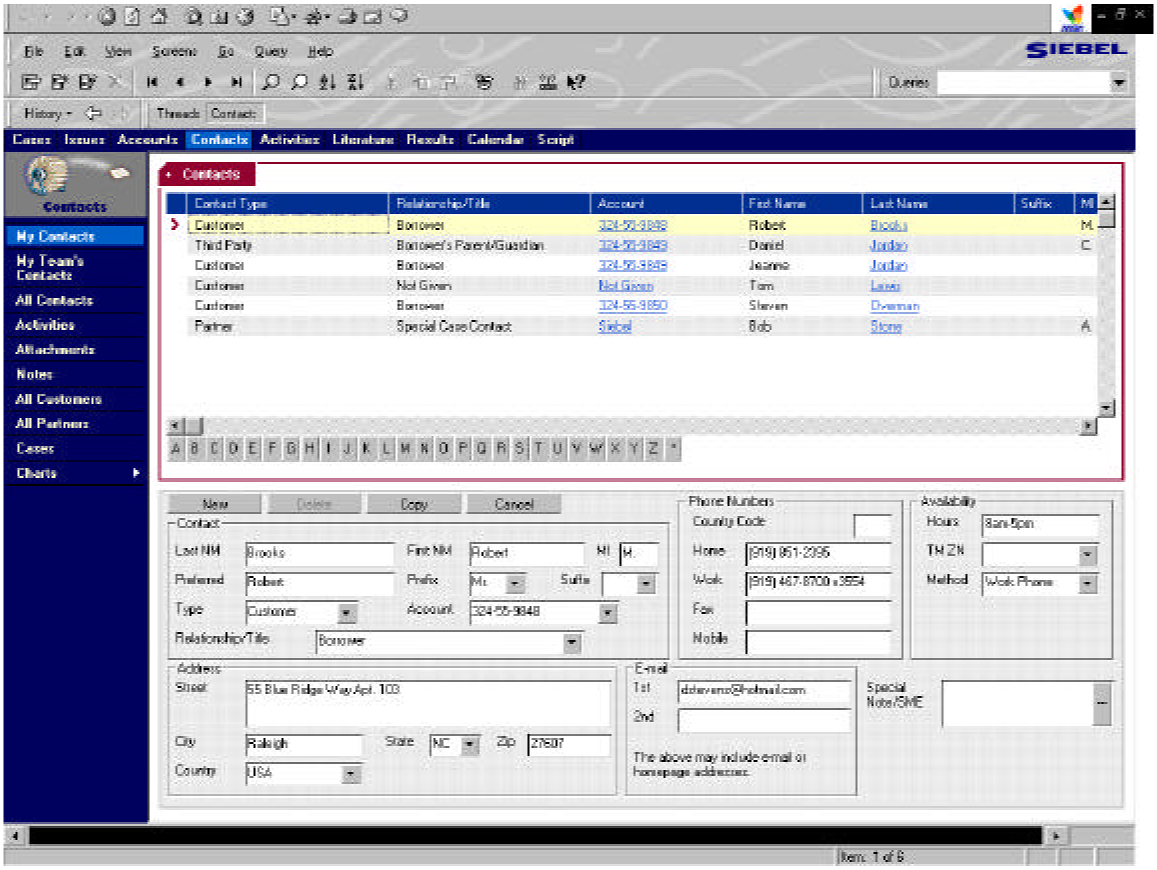
Screen Description:

The Contacts Screen contains ten views that are dedicated to entering, displaying, and using contact data. The first three views focus specifically on contact information. The rest of the views provide the ability to create activities related to specific contacts, attach files such as customer documentation to the contact, create notes about an contact, view cases associated with the contact, view contacts associated with the contact view loans associated with the contact, and monitor contact metrics via the charts section.

Following is a list of the views that comprise the Contact Screen. More details for each view are available in the subsequent pages of this document.

My Contacts
My Team's Contacts
All Contacts
Activities
Attachments
Notes
All Customers
All Partners
Cases
Charts

My Contacts View



__**View Description:**__

This view's primary purpose is to allow quick searches for specific contacts for the individual user, to display full details for a particular contact while viewing a list of his/her contacts, and for the user to enter a new contact.

> **OCTS Contact List Applet:** *top half of view*
>
> The list applet allows the user to scroll through a list of all contacts, or to select a subset of contacts to view by using the query feature. To facilitate efficient work on a contact, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed account or contact information.
>
> For a detailed data mapping please refer to Appendix B-7
>
> **OCTS Contact Form Applet:** *bottom half of view*
>
> The form applet displays all pertinent contact information for a given contact in a single, scroll-free display. The data displayed is that of the active contact in the list applet above (the selected contact with the red arrow in left-most column). A "New" button quickly creates a new contact, and the form applet provides an intuitive, efficient method of contact data entry.
>
> For a detailed data mapping please refer to Appendix B-8